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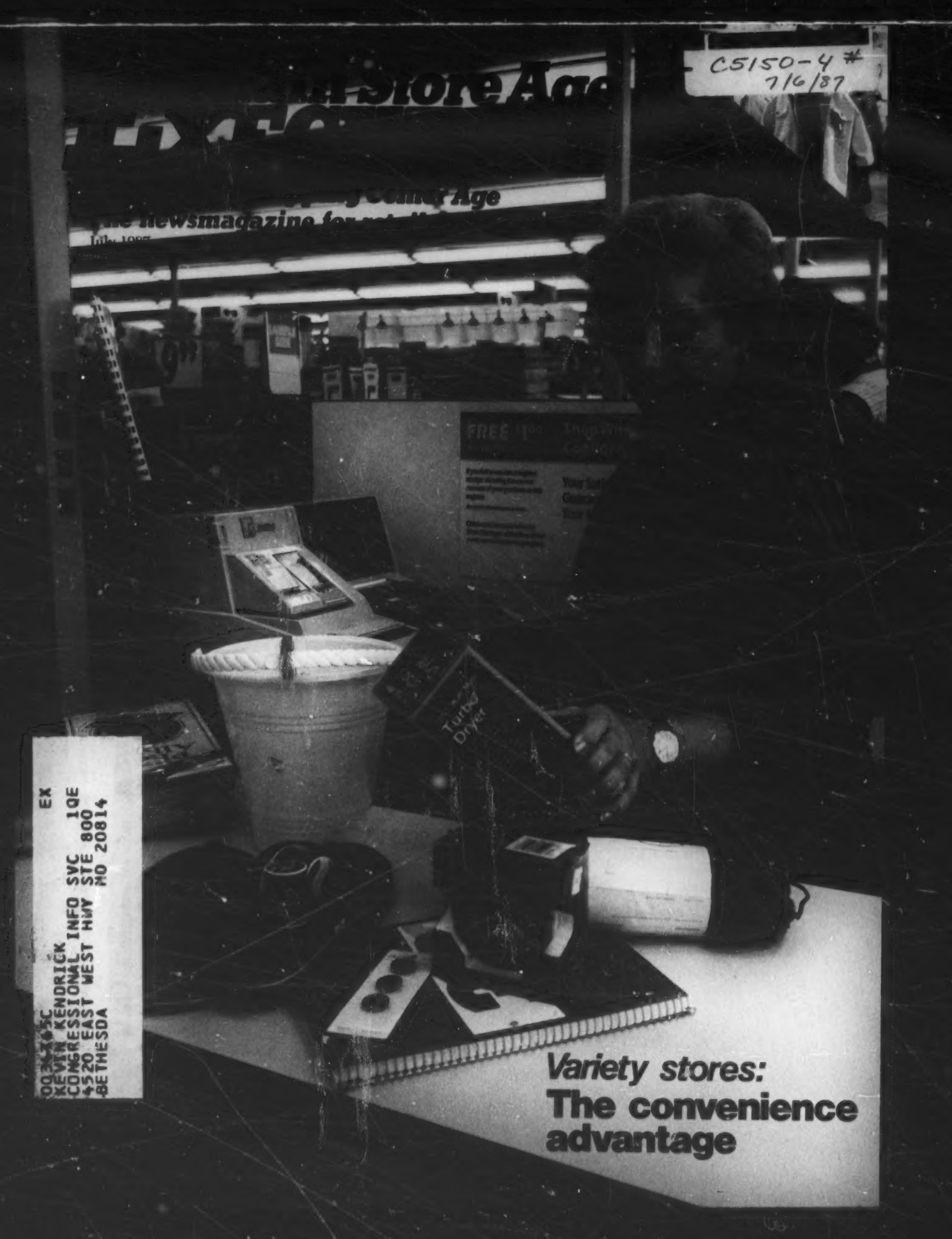

Variety stores: The convenience advantage

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SHOPPING CENTER AGE

SAN ANTONIO: SEPARATE FROM THE REST OF TEXAS

Because the city's economy has never been based on oil, it hasn't suffered like Houston or Dallas. Instead, the military is the major employer; the city is also expanding its role as a tourist mecca with the opening of SeaWorld. The result: the development of major new retail centers. 25

ANNUAL DECISION-MAKERS' DIGEST

CHAIN STORE AGE EXECUTIVE'S RESEARCH STUDY ANALYZES BUILDING TRENDS

The clues start appearing early.

In the case of the mall stores, there are often temporary facades with signs reading "Future Home of XYZ Retailer." For other retailers, the process is even more evident: prospective customers watch the construction in progress as they ride by on the highways.

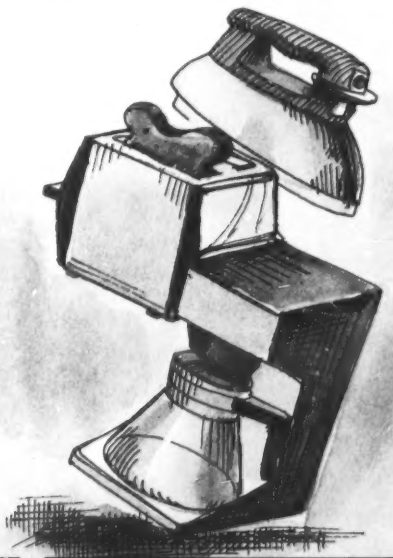
Finally, it's that long awaited moment when the retailer announces the store's Grand Opening. Customers come in and, if all has gone as planned, walk out with bags full of merchandise.

Few of these consumers realize the countless decisions that had to be made just to get the store built. Yet, the selection of the stores' physical components is critically important to its success.

Chain Store Age Executive this month presents, in its annual Physical Supports Census, information which can aid these retailers in making such decisions.

What types of flooring are being used by different retailers? What is the cost per square foot for these materials? For roofs? For ceilings? For fixtures? The answers to these and a host of other questions are presented in the pages that follow.

The survey also seeks to help retailers answer the all-important ques-



Supermarket
Existing stores: **Mean: 48,800 sq. ft.**
Amount of selling space available in typical store: **Mean: 36,209 sq. ft.**
Size of stores opened in 1986-87: **Mean: 41,200 sq. ft.**
Amount of selling space available in stores opened in 1986-87: **Mean: 30,817 sq. ft.**
Cost to erect a building shell within last 12 months: **Mean: $28.90**
Source: *Chain Store Age Executive* research

Department
Existing stores: **Mean: 148,300 sq. ft.**
Amount of selling space available in typical store: **Mean: 119,975 sq. ft.**
Size of stores opened in 1986-87: **Mean: 149,500 sq. ft.**
Amount of selling space available in stores opened in 1986-87: **Mean: 118,635 sq. ft.**
Cost to erect a building shell within last 12 months: **Mean: $40.50**
Source: *Chain Store Age Executive* research

Discount
Existing stores: **Mean: 88,700 sq. ft.**
Amount of selling space available in typical store: **Mean: 69,097 sq. ft.**
Size of stores opened in 1986-87: **Mean: 91,000 sq. ft.**
Amount of selling space available in stores opened in 1986-87: **Mean: 73,437 sq. ft.**
Cost to erect a building shell within last 12 months: **Mean: $27.20**
Source: *Chain Store Age Executive* research

tion: "How large should we build our stores?" It's impossible to provide any precise responses but it is hoped that by comparing themselves with industry averages, retailers can at least glean some insights.

Likewise, there are no easy answers to the question of how much square footage should be devoted to selling area, or how much should the store cost to erect. Again, industry averages are presented for comparison.

Unlike previous years, few clear trends emerge from these numbers. For example, while for the last several years supermarket size appeared to be on the upswing, this year the trend has reversed. The survey shows that the average size of existing stores operated by the respondents is 48,000 sq. ft.; the average size of new stores opened by these supermarketers in the past year is 41,200 sq. ft.

Drug stores also appear to be getting smaller. The average size of existing stores, according to the survey, is 14,3000 sq. ft.; the size of stores opened in the last year has fallen to 7,416 sq. ft.

Apparel stores, too, are becoming smaller, with existing stores averaging 21,200 sq. ft. in size, but the more recently opened stores averaging 14,500 sq. ft.

Conversely, both discount stores and home centers are being built larger and larger. The survey shows that the size of existing discount stores is 88,700 sq. ft. on average, compared with an average size for the newer ones of 91,000 sq. ft. For the home center industry, the numbers are 28,300 sq. ft. and 33,900 sq. ft. respectively.

The situation for the department stores is about status quo: existing stores average 148,300 sq. ft.; newer stores average 149,500 sq. ft.

No matter what the size, though, all these retailers have one thing in common: they are eager to create the kinds of stores that attract customers and keep them coming back for more. ■

Apparel Specialty

Existing stores: Mean: 21,200 sq. ft.
Amount of selling space available in typical store: Mean: 16,536 sq. ft.
Size of stores opened in 1986-87: Mean: 14,500 sq. ft.
Amount of selling space available in stores opened in 1986-87: Mean: 10,860 sq. ft.
Cost to erect a building shell within last 12 months: Mean: $28.10
Source: *Chain Store Age Executive* research

Drug

Existing stores: Mean: 14,300 sq. ft.
Amount of selling space available in typical store: Mean: 11,440 sq. ft.
Size of stores opened in 1986-87: Mean: 9,400 sq. ft.
Amount of selling space available in stores opened in 1986-87: Mean: 7,416 sq. ft.
Cost to erect a building shell within last 12 months: Mean: $28.90
Source: *Chain Store Age Executive* research

Home Centers

Existing stores: Mean: 28,300 sq. ft.
Amount of selling space available in typical store: Mean: 22,753 sq. ft.
Size of stores opened in 1986-87: Mean: 33,900 sq. ft.
Amount of selling space available in stores opened in 1986-87: Mean: 26,713 sq. ft.
Cost to erect a building shell within last 12 months: Mean: $25.50
Source: *Chain Store Age Executive* research

ANTILLA'S FIXTURES DEFINE CHAIN'S IMAGE

FINLAND-BASED RETAILER'S STORE DESIGN RELIES ON SINGLE FLEXIBLE SYSTEM

After one look at the Finland-based Antilla general merchandise chain, anyone can recognize that to describe the store is to describe its fixtures—which isn't a negative reference by any means. Rather, Antilla has established a definite image in its marketplace through the selection of its fixturing choices.

To do this, instead of behaving like American retailers, who typically rely on numerous fixturing sources for their stores, Antilla was able to turn to a single source to fulfill 90% of the fixturing needs for its stores.

The end result is a store interior that's defined by the fixture choices. The overall look of the store, the actual walls, and even the spacial definition of departments, are all created through a single fixture package.

ANTILLA: MINIMALISTIC FIXTURES GIVE HIGH-TECH FEEL TO APPAREL DEPARTMENT

"The type of fixturing that was designed and developed for it really became the total design for the store," says Michael Murphy, vp of Columbus, Ohio-based Retail Planning Associates (RPA).

As of press time, RPA had redesigned one store in the 12-unit chain, and is in the process of working on a second.

"The main thing we wanted to do for them was to show them a different way to present their merchandise," Murphy recalls. "Before the remodeling probably 80% of their merchandise was on old style 5-and-10 tables. Extra stock was housed in red transfer tote bins stored underneath these tables. So, all you had was a flat fixture presentation with red boxes everywhere."

Today there are no red boxes to be seen in Antilla, nor is there any flat merchandise presentation. "The end result was that we did do away with all the red tote bins and they actually got more merchandise out on the floor than before," Murphy states. "By taking that stock space where they house the red tote bins and turning that into usable flexible space, they were able to do away with the tote bins and put all the merchandise out on the floor. That was the overriding fixture concept."

What RPA turned to was a metal perforated wall fixturing system from G.W.S., a company headquartered in Vantaa, Finland. Supplementing that system, which is used for the majority of the merchandise presentation, are fixtures from Manchester, England-based Opto, and Wilkes-Barre, Pa.-based InterMetro Industries.

The metal fixturing system is so flexible that is it used throughout the store to display everything from skeins of yarn to ladies' blouses to food items. In fact, being able to display the stores' broad range of merchandise was a key criteria in selecting the fixturing system.

At the core of the system is a 3-ft.-square metal grid that runs overhead around the perimeter of every department in the store. The grid not only reinforces the circulation pattern, it also serves to anchor the metal wall paneling system.

The boxes formed by the grid hold snap-in light fixtures. While this grid hangs lower than the fluorescent bulbs overhead, some additional light fixtures can be popped into the grid work.

Types of fixtures used

	Total %	Discount %	Department %	Apparel Specialty %
Small racks for accessories	76	73	87	67
Gondolas	69	90	83	33
Showcases	67	57	93	40
Large racks for apparel	66	63	97	37
Glass cubes	62	70	90	27
All other mentions	1	—	—	3
Don't know/no answer	1	3	—	—

Source: Chain Store Age Executive research

Lifespan for fixtures

	Total %	Discount %	Drug %	Supermarket %	Department %	Home Center %	Apparel Specialty %
5 years or less	14	13	10	10	30	3	20
6-10 years	69	68	80	70	37	83	77
11-15 years	13	13	23	13	17	10	—
16-20 years	4	10	—	3	10	3	—
21-25 years	1	3	—	—	—	3	—
30 years or more	3	3	3	3	—	7	—
Life time/permanent/don't replace	1	—	3	—	—	—	—
As needed/required	2	7	—	—	3	3	—
Don't know/can't estimate	1	—	—	—	3	—	3
(MEAN NUMBER OF YEARS)	(8.9)	(11.3)	(10.8)	(13.9)	(8.3)	(11.3)	(7.8)

Source: *Chain Store Age Executive research*

The same boxes also hold illuminated panels which feature lifestyle photomurals. The illuminated photomurals are located throughout the 70,000-sq.-ft. store. In addition to providing esthetic appeal, they function in the stores in place of departmental signage.

The other main part of the system consists of square punched metal perforated panels, similar to pegboard or slatwall. These panels were selected because they can be used in a variety of ways: tall, wide panels can be hooked into the overhead grid to form department walls; when inserted into a base they can be used as freestanding fixtures; and narrower pieces of the paneling can be hooked to the grid work, functioning as promotional displays.

The fixtures that hang from any of these panels are completely interchangeable. For example, the same slanted shelves that are used on the wall panels can be used on the promotional displays or the freestanding units.

"The customer has the flexibility to shelve, to hang, to peg. It's totally flexible," says Murphy, speaking of the advantages for the retailer in turning to this system.

Additionally, many of the departments feature black horizontal rods atop the wall panels; they add a decorative touch and can also be used to hang merchandise.

Using this system, Antilla was able to fixture practically the entire store. For example, on the main floor, the overhead grid defines an island space that houses the women's department. While there are some traditional T-stands, four-ways and round racks displaying merchandise, the merchandise also hangs from hooks inserted into vertical metal panel fixtures in the store.

Cost per square foot for fixtures

	Total %	Discount %	Drug %	Supermarket %	Department %	Home Center %	Apparel Specialty %
Less than $3.00	14	3	20	7	13	27	17
$3.00-$6.00	25	27	43	7	10	37	27
$6.01-$9.00	23	23	20	30	17	17	33
$9.01-$12.00	12	10	7	27	10	10	10
$12.01-$15.00	9	20	3	7	17	3	7
More than $15.00	12	17	3	23	30	—	—
Don't know/ no answer	3	—	3	—	3	3	7
(MEAN)	($8.18)	($8.70)	($5.70)	($10.40)	($10.80)	($5.20)	($8.40)

Source: *Chain Store Age Executive research*

The same wall system is also used in the children's department. However, "The difference here is that there's no solid backdrop wall dividing this department," Murphy points out. "It's a free-floating island. There's the ceiling grid system that runs around the perimeter of the department; on the four corners of the department are promotional fixtures" used for special displays.

These promotional fixtures are among the few places where color can be found on the main floor. All promotional fixtures are finished with a pastel color; the color corresponds to the department in which the fixtures are located.

All of the remainder of the paneling systems used in the store are off-white.

Another place where there is color is in the photomurals. However, it was the intent of the designers to have the merchandise itself account for most of the color in the store.

Still, one department that stands out from the rest, even though it, too, makes use of G.W.S. fixturing, is the young people's department. "We wanted more of an upbeat look for young people," Murphy explains, adding that the department features "high-fashion, casual funwear" for both young men and women.

In this department, although the photomurals, overhead grid and the wall system are all the same as those used elsewhere in the store, there is one added touch that differentiates the merchandise: the theme of the black rods atop the wall panels has been carried over to the freestanding fixtures. These fixtures are black pipeline, with a minimalistic, high-tech feel (similar to what is found in the Esprit departments in U.S. department stores).

While the same metal fixturing system is used on the second floor as well, new Opto fixtures in a teal color are also being used. (Unlike the Opto fixture most people are familiar with, the new one does not use a ball connector.) Solid laminated shelving units are being used in the furniture areas, while glass top shelves are used in housewares.

"We used it [the Opto fixture] because the presentation of giftware, housewares, wicker and furniture, has a different requirement than, say towels," Murphy explains. "The look is more of a stacked look. Opto worked well because it gave us the look we wanted and teal was the main

color scheme of the store—it's in the new logo we developed, in the color striping on the exterior of the store, at checkout area, and in the basement. The use of the teal color is a tying thread."

The third fixturing system used resembles metal baker's racks, says Murphy. In the basement, gourmet cookware sits on InterMetro Industries units. "Typically, what you'll see here in the U.S. is this system in a chrome finish. In Antilla, it's all high-gloss white enamel," he adds.

Although Murphy could not comment on the total cost of the remodeling, he does indicate that the metal wall panel system, which comprises about 90% of Antilla's fixturing, is a moderately-priced system. "In the U.S., department stores typically spend anywhere from $35 to $75 per square foot for fixturing. Discounters spend $10 to $20. *[For more information on U.S. retailers' fixturing costs, see accompanying charts.]* This metal panel system runs in the vicinity of $10 to $15 per square foot." ■

CEILINGS: COLOR SETS A MOOD

LIGHTER TONES MAKE A DESIGN STATEMENT

When Space Design International, Columbus, Ohio, was asked to create an interesting atmosphere for LensCrafters' new store in Ross Park Mall, Pittsburgh, "to pull in the customers," the firm designed a vaulted ceiling using gypsum board from USG Interiors, Chicago.

Still another eyewear chain, One Hour Optical, wanted to improve its showroom ceiling design when it moved its corporate headquarters store to a new location in Denver, so it went to Armstrong World Industries, Lancaster, Pa., for assistance.

"We definitely did not want the standard ceiling in the area where we display our glasses and serve our customers," says Claudia Czajkowski, One Hour Optical's president.

"We didn't mind staying with the standard ceiling in our back office area because of lighting complaints, but we did not want them out front," she says.

To introduce a feeling of intimacy into the store's produce, bakery, deli, meat and fish departments, Kroger used a light gray ceiling from USG in its Lexington, Ky., supermarket. Gary Kaiser, vp of Retail Planning Associates, the company that designed the store, says his firm is now making more extensive use of ceilings with color in retail stores to set certain moods.

Once thought of merely as a necessity to cover up the inside of the roof or unsightly overhead pipes and wiring, ceilings have become a more important element in store design, say designers.

At the same time, retailers are now spending an average of $1.80 per square foot for their ceilings, with 2x4 ft. lay-in panels by far the most popular choice, according to research recently conducted by *Chain Store Age Executive*.

Ceilings are, in fact, one of three important planes in the interior of most buildings, says Kaiser. The other two planes are the floors and walls. Also, in most cases, the designer has to work closely with the lighting designer in installing a ceiling to get the anticipated look. Bad lighting can spoil the effect of a ceiling and vice versa.

In using color ceilings, says Kaiser, unless the lighting is compensated for, the color can "eat up the lighting."

Ceilings in themselves are not only necessary but they are inexpensive, considering their lifespans. According to a survey by *Chain Store Age Executive*, 40% or more of discount, department, drug and apparel stores, and supermarkets pay between $1.01 and $2.50 a square foot for new ceilings.

In addition, 10% of discount stores, 23% of supermarkets, and 17% of department stores pay somewhere between $2.51 and $5 a square foot for their ceilings.

But amortized over their lifespans, the price seems much more affordable. The same survey says a total of 51% of retailers who responded indicated that their ceilings last between six and 10 years, and another 30% said they last more than 11 years, sometimes up to 30 years.

In designing the LensCrafters store, says Marlene Porterfield, project executive for Space Design International, she combined the ceilings with fluorescent lighting fixtures tucked away in covers behind a continuous lead valence. The lighting was aimed at the top of the vaulted ceiling.

The design firm used a series of dry wall crossovers covered with mirrors to break up the 7,000-sq.-ft. store—the idea was to keep it from resembling a giant bowling alley, says Porterfield.

The Pittsburgh installation was completed in September 1986. As a result of its success, LensCrafters gave the go-ahead for similar designs in another 10 stores.

In the case of One Hour Optical, interior designer Geoffrey Wylde specified a new ceiling called Revisions A from Armstrong. Revisions A is an open-celled ceiling panel made of high density material molded into high-tech shapes. The new 2-ft. by 2-ft. panel is designed for a conventional grid and suspension system.

Lifespan for ceilings

	Total %	Discount %	Drug %	Supermarket %	Department %	Home Center %	Apparel Specialty %
5 years or less	8	7	13	10	—	7	13
6-10 years	51	53	60	57	30	33	70
11-15 years	14	10	13	13	27	13	10
16-20 years	8	17	3	10	10	17	—
21-29 years	3	7	—	—	3	7	—
30 years or more	4	3	3	—	10	10	—
Life time/permanent/don't replace	6	—	3	7	13	7	3
Don't know/can't estimate	2	—	—	—	7	—	3
(MEAN NUMBER OF YEARS)	(12.6)	(13.1)	(10.6)	(10.4)	(15.1)	(15.2)	(8.4)

Source: *Chain Store Age Executive* research

Cost per square foot for ceilings

	Total %	Discount %	Drug %	Supermarket %	Department %	Home Center %	Apparel Specialty %
Less than $0.50	14	7	23	7	7	37	7
$0.50-$1.00	27	37	33	20	20	23	27
$1.01-$2.50	46	47	40	40	43	20	56
$2.51-$5.00	11	10	3	23	17	3	7
More than $5.00	1	—	—	7	10	3	10
Don't know/ no answer	2	—	—	—	3	7	—
(MEAN)	($1.00)	($1.50)	($1.10)	($2.30)	($2.40)	($1.10)	($2.10)

Source: *Chain Store Age Executive* research

Types of ceilings used

	Total %	Discount %	Drug %	Supermarket %	Department %	Home Center %	Apparel Specialty %
2x4 ft. lay in panels	73	77	67	70	77	77	53
2x2 ft. lay in panels	21	—	13	13	50	—	47
12x12 concealed spline	9	3	3	—	40	3	3
Plaster	7	7	3	—	27	7	—
Acoustical	7	3	—	7	20	3	10
Tegular 2x4 ft. lay in panels	6	—	—	7	20	—	7
Tegular 2x2 ft. lay in panels	4	—	—	—	23	—	3
All other mentions	7	7	—	3	10	17	7
Don't know/ no answer	1	3	—	—	—	3	—

Source: *Chain Store Age Executive* research

According to the *Chain Store Age Executive* research study, 50% of department stores and 47% of apparel stores use 2-ft. by 2-ft. lay-in panels in their stores, as do 43% each of drug stores and supermarkets.

A major advantage of Revisions A is that the ceiling can be installed under an existing ceiling without decreasing the acoustical efficiency of the original ceiling or interfering with the store's heating, air-conditioning and lighting.

The 13,000-sq.-ft. store and headquarters is located in a 30-year-old shopping center on South Colorado Boulevard in a high traffic area of Denver.

Comments chain president Czajkowski: "We wanted a modern high-tech look, but we did not want something that would be out of fashion in 10 years. The ceiling is open, it's airy and it's different."

She adds that, "Business increased appreciably within the first few weeks of our move without advertising or any special effort."

In using colors in the Kroger stores, Retail Planning Associates went to USG for its modular Illusion Ceiling Series. The Illusion series consists of 24 colors, five designs and four texture patterns. They are 2-ft. by 4-ft. panels which look like 48-ft. by 6-ft. strips for a linear effect.

Because lighting reflects off the ceiling as well as the floor and walls, it's important that the lighting be specified in the original design, says Retail Planning Associates' Kaiser.

For years, he says, designers wanted to use color in ceilings, but they were generally limited to dark colors, mostly black.

Today, the designers are using a whole spectrum of colors, he notes. For instance, a mood of spaciousness and/or cleanliness can be achieved through the use of lighter colors, such as peach or vanilla. In another instance, light blue or a faint violet are ceiling colors that convey a serene feeling, he adds.

Whether by use of colors or vaulted ceilings, the overhead effect can help create the store image, agree the designers. ■

1986 NEW STORE OF THE YEAR AWARD WINNERS

DEPARTMENT STORES
Macy's Galleria
Burdine's
Saks Fifth Avenue
Rich's

DISCOUNT STORES
Target

DRUG STORES
Thrifty

HOME CENTERS
Gray Lumber Co. Servistar
T. W. Perry

SUPERMARKETS
Price Chopper Supercenter
Cedar Knolls Superfoodtown
McCowan's Marketplace

SPECIALTY (APPAREL)
Banana Republic
Leigh's
Casual Corner
Goldi

SPECIALTY (NON-APPAREL)
Crabtree & Evelyn
Well-Pet
Record World

LUXURY APPAREL
Amalia Branca
Polo/Ralph Lauren

SIGNAGE UPS SALES AT KIDS 'R' US BY 20%

EFFECTIVE USE OF PHOTOMURALS STIMULATES CUSTOMERS' IMAGINATIONS

Sales of certain garments at Kids "R" Us climbed 20% when mannequins were replaced with backlit transparencies of good looking children at play.

Comments Charles Lazarus, chairman of parent company, Toys "R" Us: "It stimulates people's imaginations to think about what clothes would look like on a real person." He calls the use of transparencies, "Our version of a fashion show."

Photomurals, whether backlit transparencies or huge photographs on the walls, are only one facet of the ever-growing signage phenomenon in all retail chains.

"For years, retailers tried to do without signs," says Dom Segretti, principal in the architectural and store design firm of Tucci, Segretti and Rosen, New York. "They felt that if you can't tell what department you're in, something's wrong. Don't put signage over the obvious."

But customers want signs, adds Segretti. "They [signs] offer a service message." As an example, he points out that more and more chains are putting "Service" signs over their cash-wrap desks so that customers can easily locate them, especially on cluttered selling floors.

Interior signage comes in all sizes, shapes and materials. Considering their lifespans, signs are quite inexpensive. A *Chain Store Age Executive* survey shows that 64% of all stores pay less than 25¢ a square foot for their signs. A total of 52% said their signs have lifespans of anywhere from six to 10 years, with 77% of apparel stores fitting into that bracket, 70% of supermarkets and 63% of discount stores.

Many chains currently are hanging huge fabric banners from their ceilings to proclaim messages ranging from the name of the store to specific brands or department locations.

Montgomery Ward is using foam, styrene, neon and fabrics to identify its departments and brands. Signage at Ward plays an important part in changing its image to a chain incorporating specialty shops within its four walls. For the most part, explains Norman Abplanalp, manager of concept design, Ward is working on an integrated interior signage system. It combines graphics and printing as parts of the same signs.

Purpose of the signage is threefold, he says: identify departments, establish brand names and set a mood.

For the most part, color is used for setting the mood. Basically, the chain uses bright, primary colors in its signs, rather than pastels. In apparel, colors are coded to help customers identify women's, men's and children's.

Full-color photographs show life styles. The chain also uses backlit transparencies, primarily in the center of the store for identification purposes. If the backlit sign is on the first floor, it often will tell the customers what's on the second floor.

Other chains are suspending metal or wood signs from the ceilings, also to locate departments or tell what brands are being sold. Many chains, such as K&B, the New Orleans-based drug chain, use signage strictly for utilitarian purposes. It uses wall-

Cost per square foot for interior signage

	Total %	Discount %	Drug %	Supermarket %	Department %	Home Center %	Apparel Specialty %
Less than $0.10	26	30	33	3	27	47	13
$0.10-$0.15	22	27	23	7	26	13	40
$0.16-$0.25	16	20	13	7	20	10	13
$0.26-$0.50	9	7	10	20	13	3	3
$0.51-$0.75	11	3	7	27	10	3	13
$0.76-$1.00	5	3	3	17	3	—	3
$1.01-$2.00	3	—	—	13	—	3	3
More than $2.00	3	—	7	—	3	3	7
Don't have interior signage	2	—	—	3	—	7	—
Don't know/ no answer	4	—	3	3	3	10	3
(MEAN)	($0.37)	($0.19)	($0.36)	($0.66)	($0.31)	($0.27)	($0.44)

Source: *Chain Store Age Executive* research

Lifespan for interior signage

	Total %	Discount %	Drug %	Supermarket %	Department %	Home Center %	Apparel Specialty %
5 years or less	9	13	37	13	47	53	13
6-10 years	52	63	57	70	17	30	77
11-15 years	2	3	3	3	—	—	—
16-20 years	3	3	3	7	—	—	3
21-25 years	1	—	—	3	—	—	—
26 years or more	1	3	—	—	—	—	—
Lifetime/permanent/ don't replace	1	—	—	—	—	—	3
As needed/required	8	7	—	—	33	10	—
Mall or outside supplier handles	1	3	—	—	—	—	—
Don't have it/don't use it	2	—	—	3	—	7	—
Don't know/can't estimate	2	3	—	—	3	—	3
(MEAN NUMBER OF YEARS)	(7.7)	(10.9)	(8.2)	(9.4)	(4.9)	(5.4)	(7.9)

Source: *Chain Store Age Executive* research

mounted plastic letters to identify departments, such as cosmetics, says Tom Heifner, vp. Then it suspends directories over each aisle with a product listing. Periodically is uses paper signs for special prices or promotions, adds Heifner.

Philadelphia-based Silo Stores is experimenting with the use of signs in its new prototypes (*see story this issue*). In its first modified Concept Store in Burlington, N.J., it eliminated signs reading "Television" or "Audio" over those departments because the merchandise was too obvious. But in a subsequent prototype in Turnersville, N.J., it put the signs back to help the customers find each department. But where, in the first store, Silo hung huge fabric banners with the word "Silo" on them, it removed them in the second store and used large signs featuring the names of national brands being sold.

Supermarkets are also making particularly effective use of signs to provide information to their customers, says Segretti, adding that they label everything. Most supermarkets place signs on every aisle, locating the product categories. There are also signs telling about promotions and specials.

One chain that has gone all out in providing product information on its signs is General Nutrition Centers (GNC). A. M. Carley, director of construction, says GNC uses pictorial presentations in much of its signage, as well as color coding and printed messages to tell the customers where to find specific products and what the ingredients are in these products.

Many of the GNC overhead signs are assigned specific colors and a description of the ingredients of the packages with the same colors. Thus, if a sign is green and says Vitamin C, all green packages on the shelves below the sign contain Vitamin C.

Signs on the fixtures tell the customer exactly what to expect in that particular selection, such as "No Caffeine," "High Fiber," "Skinny Munchies," "Rapid Weight Gain," "No Sugar Added" and "Low Sodium.

The use of photomurals, whether they be transparencies or just blowups of regular photographs, is one of the biggest growth areas in retail interior signage.

In color transparencies, suppliers to the retail industry include Eastman Kodak's photography division with its Duratrans, and Ilford Photo, a division of Ciba-Geigy, with its Cibachrome II. Both companies provide backlit transparencies to Sears, Roebuck Stores of the Future as well as Giorgio apparel and fragrances.

The particular transparencies used by Kids "R" Us are Cibachrome.

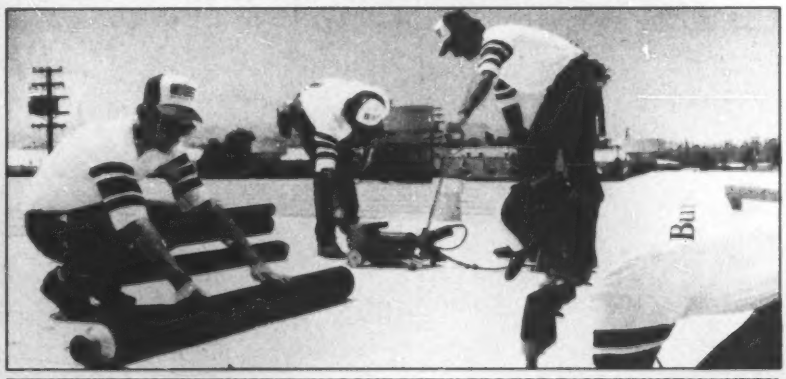
Jack Belcher, manager, exhibit and retail display markets, Ilford, explains how the Cibachrome process works. A retailer hires a professional photographer to take photos of customized settings and products that the visual merchandise team and its art directors have created.

The film is taken to a professional color lab for processing. The negative is then put into an enlarger which projects the image to a transparency. In the case of Ilford, it would produce a Cibachrome display transparency or print. Cibachrome employs a unique dye processor which prevents fading. Once the transparency or print is made, it can be rolled into a tube and shipped inexpensively to any store or location.

White Graphics has a selection of photomurals designed for supermarkets, including high-impact photo images for up to 18 different categories, including meats, dairy products, beverages, seafood, deli items and florals. ■

ROOFING: THE DEBATE GOES ON

EXPERTS WEIGH ADVANTAGES OF BUR, SINGLE-PLY



BURKELINE SYSTEM: FAVORED BY SOME RETAILERS FOR EASE OF INSTALLATION

Despite all of the interest shown in other roofing alternatives during the past few years, built-up roofs (BURs) are still being used most often, according to both industry experts and research recently conducted by *Chain Store Age Executive (see accompanying charts)*.

However, opinions vary sharply as to whether or not this will be the case in the future. "In my opinion, over the last couple years, the pendulum has been swinging toward single-ply roofing materials. But, my personal experience shows me that we will be seeing that pendulum swing back toward the BURs in 1987," predicts Gregory Hayden, president of Hayden Roofing, a Sloatsburg, N.Y.-based roofing contracting company.

Conversely, Richard Boon, senior engineer for Indianapolis-based Firestone Building Products, says, "I do a lot of work with retailers and for the most part, we are seeing the major ones switching to single-ply materials."

He points out that K mart, for example, switched from a traditional BUR in one of its locations in Venice, Fla., to a Firestone-ballasted EPDM (ethylene propylene diene monomer) system after a tornado destroyed the store's 80,000- sq.-ft. roof.

"We got a call from the folks at K mart and when we arrived at the site, the entire BUR had been raised 4 ft. off of the roof deck and had slammed back down. In addition, 10,000 sq. ft. of the roof deck was missing," recalls Bob Carnes, vp for Tampa-based General Roofing Industries.

Management's biggest concern "was to try to get the building under cover to insure that no more damage would occur to the $11 million worth of store inventory," he adds.

According to Carnes, the fastest and most cost-effective roof system (about $1.50 per square foot including installation) was the Firestone

Lifespan for roofing

	Total %	Discount %	Drug %	Supermarket %	Department %	Home Center %
5 years or less	3	7	7	—	—	3
6-10 years	11	10	13	7	13	13
11-15 years	28	40	30	23	27	27
16-20 years	37	27	33	47	47	37
21-29 years	10	10	3	17	7	13
30 years or more	2	3	—	—	3	3
Life time/permanent/don't replace	4	—	13	7	—	—
Don't know/no answer	1	—	3	—	—	—
(MEAN NUMBER OF YEARS)	(15.9)	(15.9)	(15.9)	(15.7)	(17.2)	(17.1)

Source: *Chain Store Age Executive* research

EPDM. "We put 90 men on the job Wednesday morning and we had the store open for business the following Monday," he explains.

As for the future of single-ply systems, Carnes takes a middle-of-the-road view. "I think that we are going to see single-ply increasing a little bit more although it will never take the place of the BURs. But these systems are not going to go away like many people had predicted."

Chain Store Age Executive's research shows that in 1985 BURs were used by 46% of the survey participants, with 38% using single-ply membranes. In 1986, 52% of the participants in the survey used BURs; 49% used single-ply roofing materials.

According to Boon, there are two reasons for the increase in single-ply roof jobs. "First, there is a value reason. I believe retailers find that the traditional BURs don't last as long as the single-plys. BURs have always been competitively priced, but single-ply is also competitively priced. Second, the life expectancy in general of the single-ply is longer," he maintains.

One of the most common uses for the single-ply material has been for reroofing jobs. "By putting the new roof on top of the old one, it reduces the risk of water damage to the inside of the building," says Boon.

Eliminating the leakage problems was something that caused Harold Pennock, architect for Town and Country, a Palo Alto, Calif.-based shopping mall, to choose a single-ply material for a recent reroof project.

He explains, "We installed the Burkeline mechanically-fastened roofing system on some of the center's buildings to eliminate leaks. We have found that the Hypalon material in the Burkeline system is much better than the composition that was previously used."

Because the Burkeline system consists of a Hypalon material, Steve Rhodes, field manager for San Jose-based Burke Industries, (manufacturers of the Burkeline system) says that it has some advantages over other single-ply materials.

For example, although the single-ply membrane as a whole is superior to the other types of roofing materials, Hypalon in particular is gaining in popularity because of its ease of installation and the safety involved. In addition, there is the longevity, especially in climates where there are extreme changes in weather, he says.

Because of its high reflectivity, Rhodes says that the Hypalon material is often used in warmer climates. "It has incredible expansion ability. In Dallas, for example, the temperature will often reach 105°F. The black BUR rooftop will exceed 160°F. Once the rain comes and cools the temperature, the roof will experience thermal shock. This means that the roof will go from 160°F to 60°F in a very short amount of time. Roofs are not prepared to take that. Because the Hypalon is white, it will not experience this kind of thermal shock."

Although Hypalon is an alternative for some retailers, the cost of the material is higher than other single-ply materials and BURs. According to Hayden, the cost for a Hypalon system vs. other roofing materials is between 25% to 30% more expensive.

"It cost us more for the Burkeline roof system than it did for the other material, but we feel it will pay for itself very soon. It will resist deteriorating over a period of years. Where we have installed the Burkeline system, we have had no troubles with leaks," reports Pennock. ■

Types of roofing used

	Total %	Discount %	Drug %	Supermarket %	Department %	Home Center %
BUR	52	60	67	53	38	57
Single-ply membrane	49	60	30	43	69	33
Metal	16	37	3	7	—	33
Fabric	9	27	7	—	—	10
All others	4	10	—	7	—	3
Don't know/no answer	3	—	3	—	3	7

Source: *Chain Store Age Executive* research

Cost per square foot for roofing

	Total %	Discount %	Drug %	Supermarket %	Department %	Home Center %
Less than $0.50	5	3	17	3	—	3
$0.50-$1.00	17	20	27	10	—	30
$1.01-$2.50	41	30	23	53	69	50
$2.51-$5.00	21	33	10	23	33	—
More than $5.00	7	10	3	10	13	—
Don't know/ no answer	6	3	20	—	—	7
(MEAN)	($2.46)	($2.80)	($1.88)	($2.66)	($3.20)	($1.89)

Source: *Chain Store Age Executive* research

FLOORING CHOICES MAKE AN IMAGE STATEMENT

RETAILERS ARE INVESTING IN QUALITY PRODUCTS TO IMPRESS CUSTOMERS

Carpeting has been a widely accepted flooring material for the Hayward, Calif.-based Mervyn's chain for a number of years. However, one of the problems experienced by Roger Harris, Mervyn's director of store planning, is related to carpet stretching.

"It is a problem that is common to all retailers who use carpeting in their stores," says Harris. "It started happening to us about four years ago and is especially severe in our stores that are located in the south central parts of the U.S. where the humidity is very high."

When carpet stretching occurs, the carpet often buckles and forms ripples so that it becomes dangerous for employees and shoppers.

In addition to being a safety hazard, Harris says, it looks unattractive.

Harris is finding, though, that one means of preventing this problem is the selection of the carpet backing. For example, he has begun using The Enhancer Plus, a eurethane foam carpet backing manufactured by Dalton, Ga.-based Dow Chemical.

One of the advantages of using this product, according to Harris, is that the foam (which also acts as a carpet padding) is adhered to the back of the carpet prior to its arrival at the store. Installation at the store level involves laying the carpet, complete with enhancer, directly to the concrete floor.

In addition to the eurethane foam, there is a layer of polyester fleece that lies between the foam padding and the concrete floor. When the retailer chooses to remove the carpet, the fleece lining aids in carpet stripability without the need for extra equipment.

Although some retailers choose to glue their carpets directly to the floor base to prevent carpet stretching, Harris has opted for The Enhancer Plus because of its ease of installation and removal.

"Some retailers glue the carpet to the floor surface. We've been against this procedure because we remodel our stores on a regular basis, so we did not want to be locked into staying with a specific carpet for any extended period of time. We were afraid that we wouldn't be able to get the carpet up when we wanted to," he says.

According to Harris, the enhancer secures the carpet to eliminate stretching and also makes carpet removal easy without a lot of cost involved.

"Carpet that has been glued to the floor can cost between $3 and $4 per square foot to remove. Our cost with the new product is virtually nothing because the carpet can be picked up in large quantities. You don't need to do it in little pieces and then do a lot of scraping to remove the excess carpet," he says.

Although Harris was unable to give his cost for The Enhancer Plus, he says that the initial investment is higher than it would be for conventional padding. In the long run, however, he says that it saves him time and money. Installation time is decreased because carpet that has been treated with The Enhancer Plus can be laid down in larger pieces than if the carpet were to be glued directly to the floor base.

Spending more money on flooring surfaces such as Harris has done is a move that many retailers are making in an attempt to upgrade their stores' appearance and to make a better impression on customers.

According to research conducted by *Chain Store Age Executive*, retailers are now spending an average of $2.10 per square foot for flooring; department stores, though, with their heavy use of carpeting are averaging $4.20 per square foot. However, the most popular flooring choice in general is still some type of vinyl product. *(For more information, see accompanying charts.)*

Harris observes, "One of the trends that I see occurring in the industry is that retailers, in general, are becoming aware of flooring and the cost of other things that make up the

Lifespan for flooring

	Total %	Discount %	Drug %	Supermarket %	Department %	Home Center %	Apparel Specialty %
5 years or less	12	7	13	7	20	10	13
6-10 years	59	40	77	70	60	33	73
11-15 years	16	27	7	17	10	27	10
16-20 years	6	10	—	3	3	17	—
21-25 years	2	7	—	—	—	3	—
30 years or more	1	3	—	—	—	3	—
Life time/permanent/don't replace	3	7	3	3	—	7	—
Don't know/can't estimate	2	—	—	—	7	—	3
(MEAN NUMBER OF YEARS)	(10.2)	(13.1)	(9.7)	(9.6)	(9.4)	(13.3)	(8.3)

Source: *Chain Store Age Executive* research

Cost per square foot for flooring

	Total %	Discount %	Drug %	Supermarket %	Department %	Home Center %	Apparel Specialty %
Less than $0.50	8	—	10	3	7	23	7
$0.50-$1.00	37	37	53	36	7	53	4
$1.01-$2.50	29	47	30	27	29	20	32
$2.51-$5.00	14	7	3	27	37	—	13
$5.01-$7.50	7	7	3	13	19	—	7
More than $7.50	4	3	—	—	20	—	—
Don't know/see	1	—	—	—	—	3	—
(MEAN)	($2.10)	($2.10)	($1.30)	($2.50)	($4.20)	($0.80)	($1.80)

Source: *Chain Store Age Executive* research

Types of flooring used

	Total %	Discount %	Drug %	Supermarket %	Department %	Home Center %	Apparel Specialty %
Vinyl	64	73	40	76	76	80	10
Carpet	50	37	53	3	100	17	90
Terrazo	24	17	17	33	67	3	7
Quarry tile	21	23	10	—	70	10	13
Concrete	20	23	—	7	90	27	3
VAT	16	10	—	3	67	13	—
Hardwood	15	3	—	3	77	3	3
Marble	3	—	—	—	17	—	—
All other resilient	2	—	3	3	—	—	3

Source: *Chain Store Age Executive* research

total design package of a store. In the past, we weren't so caring because flooring wasn't a big part of the overall expense. Now the competition is heating up and retailers are looking at ways to curtail costs."

In addition, no longer is it that floors are simply the surfaces that shoppers walk upon; retailers and consumers alike recognize that the choice of flooring material contributes to the store's image.

In fact, "I think retailers are becoming more conscious of the floor material that they select for their stores because it is the first thing that people see when they walk through the door," says Mike Ham, account manager for Dallas-based American Marazzi, a manufacturer of ceramic tile. "The floor can detract from the image that the retailer is trying to promote if it is not a quality product. The trend is toward specialty retailing so it is important to create a much more upscale look—a finer look."

Ham maintains that one reason why more merchants are opting for ceramic products is because of the esthetics involved. Sometimes this tile is also being used in conjunction with carpet.

A recent introduction to the flooring industry is Marazzi's Nobel Series, which consists of ceramic tiles that are speckled to resemble granite, yet at the same time look monochromatic from a distance. The reason for the speckled effect, according to Ham, is to disguise scuff marks and other scratches that come with heavy foot traffic.

"I think that retailers are looking toward the whites and the monochromatic colors to keep pace with the more contemporary trends in terms of store design. Pastels have been around for years and colors seem to be continuing to get softer. In addition to the light colors, often you will see a white floor tile contrasted with a

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black tile or white with some other solid color," he says.

One of the problems described by Gary Cross, marketing manager for Lancaster, Pa.-based Armstrong Resilient Flooring: "Retailers are constantly asking for something different from the traditional vinyl tiles. They want us to give them fresh colors yet still maintain the durability of the vinyl tile products," he says.

In order to meet this growing demand, Cross says that his company has recently developed Stonetex, a vinyl floor tile series similar in composition to Armstrong's traditional vinyl tile, but with a different design pattern. Instead of solid colors, the Stonetex series offers tiles with a speckled appearance, similar to what Marazzi has created with its Nobel Series.

"The unique aspect about Stonetex is that it is totally different in terms of its appearance. From a distance, each tile looks monochromatic, but when you get up close, it has a salt and pepper appearance," he explains.

One of the inspirations for the design of Stonetex, according to Cross, is a direct relationship to a trend that he sees occurring in the retail industry.

"Retailers are starting to want materials like Stonetex which are variations of the traditional vinyl composition floor tiles. These can give them some custom finish effects. [Merchants] can do a really nice job with basic materials," he says. ■

FLOOR CARE COMES FIRST

SELECTION CRITERIA: COST ISN'T EVERYTHING

FLOOR CARE: SOME CHAINS OFFER INCENTIVES TO MAINTAIN A HIGH GLOSS

Cost is an important consideration in selecting flooring in retail stores, but it's far from being the major factor.

Rather, say maintenance and service managers, ease-of-maintenance, safety, appearance, durability and design come before the dollar signs. Cost is an important consideration, says M. L. Nealis, vp-construction and maintenance of Washington, D.C.-based Woodward & Lothrop, department store chain, but the most important factor is design.

"We will reject some flooring material if it is too expensive," he says, "but design and maintenance usually come first.

"We have just resurfaced some 15,000 sq. ft. to 20,000 sq. ft. with marble, but the price came within our budget."

Maintenance has a lot to do with selection of flooring materials, says George Steinmetz, vp-maintenance and construction, King Kullen Grocery, a Westbury, N.Y.-based supermarket chain. He recommends checking competitors to see how they fare with specific materials as far as maintenance and longevity are concerned.

Terrazzo is a good flooring material even if the cost is high, says Steinmetz. One Florida supermarket chain he knows put in terrazzo, but in its newer stores, it reverted to asbestos tile, which is cheaper but doesn't wear as long.

Steinmetz recommends quarry tile. First, he says, it's easy to maintain. "Just wash it," he says. His maintenance crews use high speed burnishers to give them a high gloss finish.

Ken Zeinemann, manager of maintenance and services, Schultz Sav-O Stores, Sheboygan, Wis., also wants floors that have a high gloss finish, so he recommends composition tile. The customer, he explains, expects the high gloss ("she sees it in discount stores all the time") and his chain is equipped with high speed burnishers (2,000 rpm) to give the floors that gloss.

But this high gloss look isn't restricted to supermarkets. Woodward & Lothrop's Nealis says design and appearance are top considerations in selecting flooring. The chain uses a diversity of materials, including marble, vinyl tile and wood, as well as carpeting.

"We recently bought all high speed burnishers to replace our regular buffers for maintaining floors," says Nealis. The buffers are slow, whereas the high speed burnishers are four times their speed.

Bi-Lo, a Mauldin, S.C.-based supermarket chain, uses vinyl asbestos tile (VAT) throughout its stores except in the produce section, says Carol Sullivan, equipment buyer. In that one area, it uses Milliken carpet squares. There are two reasons for the carpet, says Sullivan: for an upscale look and as a safety factor against slipping and falling.

While it looks nice, carpeting isn't all that easy to maintain, he says. If you put down a dry capture product while the carpet is wet and brush it in, it will cake. The way to avoid this is to use a wet vacuum substance. On the positive side, the individual squares can be picked up and replaced easily if problems arise in one particular

Cost per square foot for flooring maintenance

	Total %	Discount %	Drug %	Supermarket %	Department %	Home Center %
Less than $0.10	22	27	20	10	13	40
$0.10-$0.14	9	23	3	3	3	10
$0.15-$0.25	21	27	33	10	27	10
$0.26-$0.50	14	13	23	7	13	13
$0.51-$0.75	11	—	3	27	23	—
$0.76-$1.00	9	7	7	23	3	—
$1.01-$2.00	3	—	3	7	3	—
More than $2.00	3	3	7	—	7	—
Don't know/ no answer	7	—	—	10	7	20
(MEAN)	($0.42)	($0.29)	($0.47)	($0.61)	($0.54)	($0.14)

Source: *Chain Store Age Executive research*

Lifespan for flooring maintenance equipment

	Total %	Discount %	Drug %	Supermarket %	Department %	Home Center %
5 years or less	44	23	67	67	33	30
6-10 years	11	20	7	10	7	13
11-15 years	3	10	—	—	3	3
16-20 years	1	—	—	—	—	3
21-29 years	—	—	—	—	—	—
30 years or more	—	—	—	—	—	—
Life time/permanent/ don't replace	3	—	7	3	—	7
As needed/required	1	7	—	—	—	—
Mall or outside supplier handles	25	33	20	7	57	10
Don't have it/don't use it	8	3	—	7	—	30
Don't know/can't estimate	2	3	—	7	—	3
(MEAN NUMBER OF YEARS)	(5.1)	(7.9)	(3.7)	(3.1)	(6.9)	(6.6)

Source: *Chain Store Age Executive research*

spot.

Supermarkets have a special maintenance problem wherever there is a chance of water getting under the flooring, especially under refrigeration and frozen food cases.

In recommending quarry tile for his chain's floors, King Kullen's Steinmetz says that when the tile is set in concrete, it is almost impossible for water to get underneath it. These are the areas where it is generally used. "We don't need it [quarry tile] in the general or aisle areas," he says.

The problem with asphalt tile is that water can seep under it easily and its lifespan is too short, adds Steinmetz. "We've noticed that around the checkout counters, it's worn through because of heavy traffic."

With quarry tile, a chain pays a little more up front than for asphalt tile, says Steinmetz, but the chain has to evaluate maintenance and lifespan. What does it cost to maintain? he asks.

There is a drawback with quarry tile, he says. "How do you match it if—10 years later—you want to chop it up and match it with the remaining quarry tile?"

Bi-Lo's Sullivan says that his chain rarely has problems with water under the tiles, mostly because when they're installed, they're put on a good base.

In maintaining the VAT floors, Sullivan says, the maintenance crew first uses automatic scrubbers. Then they use 1,000 rpm electric buffers to put on a gloss.

Schultz Sav-O's Zeinemann says his company has looked at terrazzo and vinyl tile, but it sticks with composition tile. The vinyl is too soft for a supermarket floor, he says.

He admits, however, that unless the composition tile is installed over an empty floor, there may be water problems from humidity or leakage. If an existing case is raised and the composition tile is just slid underneath, water can get under the tile and lift it. However, if the company starts from scratch and seals it as it lays it down and then places the cases on top of it, rarely is there a problem, says Zeinemann.

Schultz Sav-O has worked out a program with Johnson Wax for maintenance of the supermarket floors on a regular basis. In the program, maintenance workers are given incentives to keep a high gloss on the floors. A competition is maintained from Dec. 15 through March 15, the worst months of the year as far as weather and dragging in slush are concerned.

Vice presidents from the chain visit the stores during that period and evaluate the floors from a maintenance angle, says Zeinemann. The inspections are also carried out during the remainder of the year, he says, but not with the same intensity.

Results have been quite favorable, he says. He points out that a store can't let a day go by without buffing the floors. If someone is out ill, someone else has to do the job that day.

Another proponent of daily maintenance is Woodward & Lothrop's Nealis. "If you let it go, there's no catching up," he says. Also, "If you buy a new flooring material, it is important that you get maintenance material and criteria from the supplier," he says.

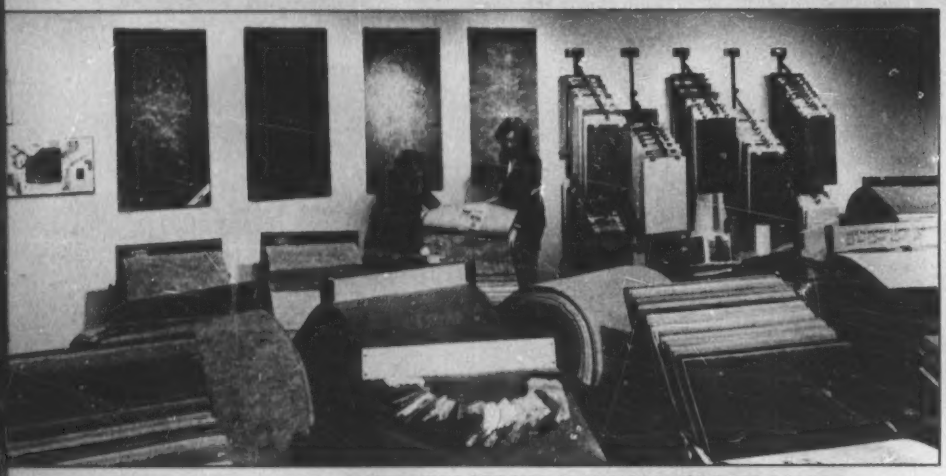
On the subject of durability, Zeinemann says that composition tile will stand up under great pressure. It can take 3,500 lb. of weight and have a lifespan of 15 years. Vinyl tile, he says, won't last that long.

But even composition tile has its limits in certain areas, such as the checkout area of supermarket, says Zeinemann. Because of customer traffic and bag boys/girls, the composition tile will last only about one-third of the regular life of the tile in other areas of the store, or about five years, rather than 15 years, he says.

Nealis ends with a warning: Don't put too much floor finishing materials down. "You have to strip it away periodically and reseal the floor." ■

RELAMPING PLAN KEEPS MERCHANDISE INDOORS

CONTEMPORARY CARPETS SHINES NEW LIGHTS ON ITS PRODUCT DISPLAY



CONTEMPORARY CARPETS: CUSTOMERS SEE MERCHANDISE IN ITS TRUE COLORS

A common sight for the employees of St. Louis-based Contemporary Carpets was shoppers taking carpet swatches outside into the natural sunlight in order to determine the true color of the product.

"People like to bring in fabric samples to match up with the carpeting. They would actually pick up the carpet samples and take them outside to match colors more accurately," explains Carol Arechederra, president of Lighting Design Consultants, a St. Louis-based company that devised a relamping program for the store.

For this project, she selected General Electric's fluorescent SP 30 lamps which provide the shopper with truer color rendition. Prior to the new fluorescent lamps, Arechederra says the store was illuminated with a number of 2x4 recessed fluorescent tubes. "The old lighting program created poor color rendering for the vivid [hues] of the carpet samples," she says.

In addition to the new fluorescent lamps, she chose GE's 90 watt PAR halogen Performance Plus bulbs for the existing track fixtures. Previously these housed blue ER lamps.

According to Frank LaGiusa, senior lighting specialist for Cleveland-based General Electric, "The Performance Plus lamps are a little whiter and give off more light. It is a no-lose situation," he says.

Lew Felberbaum, president of Contemporary Carpets, says that the cost to relamp the store was about $1,000.

"The old lighting system presented us with a problem that we didn't know we had. The new lamps have cut down on customers' tearing up our displays in order to take the carpets to the windows, and it saves us a lot of time too," he reports.

Felberbaum's experience with relamping his store to create a more accurate representation of his merchandise is something that Arechederra says is happening frequently throughout the retail industry.

"The major trend I see is that [retailers] have become more aware of lighting and how it affects their merchandising. Instead of a single system, they are going to several different types of lamps for different effects and moods. They are also using better color rendering lamps and doing more with accent lighting," she says.

According to research conducted by *Chain Store Age Executive*, retailers on average are spending 77¢ per square foot for their interior lighting needs. However, department stores participating in this survey report spending a whopping $1.41 per square foot *(see chart)*.

At Buffalo, N.Y.-based Adam-Medrum-Anderson, a 10-unit department store chain, John Ditch, director of operations, has recently rethought the chain's entire lighting program.

"Retailers are paying attention to the way in which their stores are illuminated, particularly when it comes to color rendition. People hate like hell to buy something blue and take it home only to find out that it is really purple," he explains.

In the chain's flagship unit, Ditch says that the new lighting program consists of Sylvania Super Saver Plus bulbs manufactured by Danvers, Mass.-based GTE Products.

"These offer us a high color rendering and allow our merchandise to stand out better. In addition, the life expectancy of each bulb is about 26,000 hours, which is more time than with our old system," says Ditch.

In the chain's most recently built units, Ditch says that he chose to im-

Cost per square foot for interior lighting

	Total %	Discount %	Drug %	Supermarket %	Department %	Home Center %	Apparel Specialty %
Less than $0.10	11	23	23	7	3	3	7
$0.10-$0.14	18	23	13	10	7	13	43
$0.15-$0.25	12	20	17	3	7	10	13
$0.26-$0.50	41	20	17	13	10	17	7
$0.51-$0.75	7	—	7	20	3	13	—
$0.76-$1.00	7	—	10	17	3	7	7
$1.01-$2.00	13	10	10	13	33	3	7
More than $2.00	13	3	3	13	30	17	13
Don't know/ no answer	4	—	—	3	3	13	3
(MEAN)	($0.77)	($0.39)	($0.49)	($0.91)	($1.41)	($0.85)	($0.65)

Source: *Chain Store Age Executive* research

Lifespan for interior lighting

	Total %	Discount %	Drug %	Supermarket %	Department %	Home Center %	Apparel Specialty %
5 years or less	19	17	30	13	13	23	17
6-10 years	45	43	37	60	33	23	73
11-15 years	13	10	27	7	13	17	3
16-20 years	8	13	3	10	13	10	—
21-29 years	1	—	—	—	—	7	—
30 years or more	2	3	—	—	3	3	—
Life time/permanent/don't replace	4	3	—	7	3	7	3
As needed/required	4	7	—	3	7	7	—
Don't know/can't estimate	3	3	—	—	13	—	3
(MEAN NUMBER OF YEARS)	(10.2)	(11.5)	(9.1)	(9.5)	(12.3)	(11.9)	(7.7)

Source: *Chain Store Age Executive* research

LIGHTING AWARENESS: USING VARIOUS LAMPS FOR DIFFERENT EFFECTS

plement GTE's Octron fluorescent bulbs. "In these units, we were interested in reducing the number of fixtures and in turn the number of bulbs. The Octron lamps permit us to do this without cutting back on the amount of illumination in the stores," he explains.

According to David Krailo, manager of fluorescent products for GTE, the Octron series produces a 24% savings in energy costs without any loss of lighting output. The Super Saver Plus series gives about a 17% energy savings with a 5% to 7% reduction in light output.

In addition to changing the fluorescent tubes, Ditch also switched form a cool white lamp to GTE's Designer Series D30, a warm white lamp.

"I think that there is a trend in the industry toward the warmer lamps. They have the ability to render colors more effectively, yet allow for high energy efficiency," says Krailo.

Ditch is unable to give the cost for the relamping project, but he says that the payback period has been about 18 months for the entire chain.

"The difference in the stores is absolutely amazing. There is a level of brightness that wasn't there before and we also are experiencing a significant energy savings," he says.

Meanwhile, shoppers at Dominick's Finer Foods may not realize it, but the Chicago-based retailer has reduced the number of lights illuminating two of its 24-hour units. As a result, it has reduced its annual energy consumption bills by $22,000 per unit.

The company maintains that it's been able to achieve such savings, without any significant decreases in the overall level of illumination, as a direct result of installing Silverlux fluorescent reflectors (from 3M) in these two units.

"By using the new system, we have been able to cut back on the energy consumption dramatically. In our River Grove, Ill., store, for example, we were able to reduce the bills by $2,000 a month," says Charles Burgess, electrical engineer for Dominick's. (Prior to the July 1986 installation of Silverlux, the unit's average annual energy bill was $205,000; it is currently averaging approximately $180,000 annually.)

Burgess explains that by using these reflectors, he has been able to remove two fluorescent lamps and one ballast from each fixture. Burgess now relies on the reflective material to maintain an illumination of 80 footcandles in each store. This is about the same number of footcandles that was given off prior to the new installation, he explains.

Previously, "We were using surface-mounted fixtures and recessed fluorescent lamps [each fixture contained four lamps]. The reflecting medium was the white paint that served as a backdrop for the fluorescent tubes," says Burgess.

With the 3M reflectors, "We have essentially cut the number of fluorescent tubes and ballasts in half, and we do not need to buy nearly as many replacement units as before," he says.

In addition to the light energy savings that come from using the silver film, "We have a savings on our air-conditioning consumption because we don't have the amount of heat generated in the stores that we did in the past," says Burgess.

One of Burgess' concerns, prior to installing the new lighting fixtures, was that the stores would appear to be slightly darker and not highlight the product as well as when the store had more fixtures. This, however, has not been the case. In fact, he says that there is no difference in the appearance of the products in the units.

The cost for the system depends upon the number of reflectors needed and the design criteria for each fixture. The average cost, according to Roger Proch, national sales manager for 3M, ranges between $55 and $65 per fixture.

The cost to install the system for Dominick's was about $22,000 for each of the two units. According to Burgess, the system pays for itself in about 13 months. ■

PRE-COOLING: CUTTING DOWN ON HVAC COSTS

TEST AT MILLERS OUTPOST LOWERS TEMPERATURES AS WELL AS ENERGY BILLS

Lifespan for HVAC

	Total %	Discount %	Drug %	Supermarket %	Department %	Home Center %
5 years or less	12	7	17	13	10	13
6-10 years	19	27	37	17	—	13
11-15 years	19	17	13	17	13	33
16-20 years	26	23	10	30	37	13
21-29 years	9	3	—	10	20	10
30 years or more	5	—	—	7	7	10
Life time/permanent/don't replace	5	—	17	3	—	3
As needed/required	2	7	—	—	—	3
Mail or outside supplier	3	3	7	—	7	—
Don't know/can't estimate	2	3	—	—	7	—
(MEAN NUMBER OF YEARS)	(14.8)	(14.6)	(9.7)	(15.4)	(18.3)	(15.2)

Source: *Chain Store Age Executive* research

During these hot summer months, maintaining sufficient air-conditioning is a tough task for any retailer or shopping center developer. However, it is particularly difficult for anyone located in the country's desert regions.

For that reason, "We see a great deal of interest in pre-coolers being displayed by people with stores in those areas where energy costs are quite high," observes Paul Reynolds, division sales manager for Research Products Corp., Madison, Wis.

He estimates, for example, that pre-coolers "can save retailers and shopping center owners as much as 20% of their electrical usage costs." However, he adds, "The people who contact us aren't only interested in reducing energy costs, but they also realize that installing our pre-coolers is really a form of preventive maintenance" since they substantially reduce the temperature of the air going into the condenser.

"When Millers Outpost decided to install pre-coolers at a store in the San Fernando Valley, we took the temperature on the roof. At first, it was 108°F. But after we turned on the pre-cooler, the air entering the condenser was down to 89°F. This meant that the head pressure had been reduced by about 45 lb. and the electrical load had been reduced by approximately 5 amps."

Based on the savings at the "test" store, Millers Outpost has since installed these pre-coolers at an additional three units "and we have sized another 19," says Reynolds. He adds, "As important as the electrical savings are, by improving the efficiency of air-conditioning systems, pre-coolers can also help retailers maintain the comfort of their customers."

A pre-cooler, attached to the condenser of a mechanical refrigeration or air-conditioning system, works by "pre-cooling" warm outside air that passes over condenser coils.

The basic principle behind the pre-cooler is based on water circulating through a pad. As the water evaporates, the surrounding area is cooled, helping to reduce the cooling load that must be handled by the air-conditioning system, and thereby eliminating excess wear and tear.

The recirculating units found within most pre-coolers consist of a reservoir, pump and float.

Reynolds admits, "In some areas pre-coolers got a bad name because of maintenance problems associated with the recirculation mechanism. Obviously, most air-conditioning contractors stress that for the product to be worth the price, it has to reduce—not add to—maintenance problems, but it sometimes seemed just the opposite was happening."

A new pre-cooler from Research Products works on a different principle. Instead of utilizing a recirculation system, its pulse-setting control allows water to be flushed through the system by single-pass. It also permits time-sequencing water flow based on outside temperatures, thereby reducing the amount of water used by the system.

The advantages, though, of the pre-cooler systems seem to be offsetting many of the past problems, especially as more utility companies begin offering rebates for pre-coolers used at commercial/industrial facilities.

The cost of heating, ventilation and air-conditioning currently averages 84¢ a square foot, going up to as high as $1.08 per square foot for supermarkets and $1.06 per square foot for drug stores, according to *Chain Store Age Executive* research. ■

Cost per square foot for HVAC

	Total %	Discount %	Drug %	Supermarket %	Department %	Home Center %
Less than $0.10	9	7	10	3	7	17
$0.10-$0.14	12	27	10	3	13	7
$0.15-$0.25	19	27	27	7	20	13
$0.26-$0.50	10	3	7	20	10	10
$0.51-$0.75	13	7	3	13	23	17
$0.76-$1.00	7	—	7	13	7	7
$1.01-$2.00	9	13	3	17	3	7
More than $2.00	17	7	23	23	13	13
Don't know/ no answer	5	10	—	3	3	7
(MEAN)	($0.84)	($0.97)	($1.06)	($1.08)	($0.71)	($0.78)

Source: *Chain Store Age Executive* research